Upstream Engage

Video Consultation Complete User Guide

Supporting patients to connect from their own homes

upstream.health 📒

How it works

Upstreams Engage solution provides patients with the opportunity to connect to their care team from the comfort of their own home.

Care teams can either book on the patients behalf, or make available bookable 'slots' for patients to book themselves.

At the allotted time patients log in to a virtual waiting room to be seen. Either through the Engage app or just in their mobile or laptop browser via the 'Quick join' link.

Clinicians use the Collaborate mobile application or clinical portal, to start the video consultation and record the consultation notes in real time.



Option 1 : Quick join



Care team book appointment









Care team publish availability

Option 2: Enhanced



Patient books appointment



Patient joins from any device, directly from link



Enhanced support and video through Engage App





Book initial consultation

How clinicians make booking for patient

Step 1

Login to Clinical Portal and access your diary or select drop down to select team members diary



Step 2

Hover over the appointment slot and select to make booking

1	му Ар	pointments			Today	uturo	Show calendar Darren Test	
3	My Tasks				Today 22 Apr	2020	Patients in my waiting room	
InP		rson			Cardiology			
9	0	Seen	۲	0	9 am			
D.	C	Waiting	۲	0				
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		Video Consultation	(4)		lpm		Pending documentation	
							_	
					2 pm	Circle the to book an appointment at 0200 pm		
					3 pm		_	
							There are no pending documentations for today	
					4 pm			
					6 pm			

Step 3

You now have the majority of information auto populated



Next step, next page





Book initial consultation

How clinicians make booking for patient

Step 4 Validate the auto populated information. (tip : You can always change the clinician if needed)

Clinic Cardiology	😵 Practitioner 😌 Identify Patient	Confirm
Practitioner Darren Test 22 Apr 2020	Identify patient	
Visit type Video Consultation	Q Search patient mobile/UHID	
Consultation time 01:30 pm		

Step 5

Enter the patient ID to search for your patient



Step 6

Results are displayed, and all you need to do now is click on your patient. You can use other search options as needed.

Next step, next page





Book initial consultation

How clinicians make booking for patient

Step 7

Once patient is selected you just need to check or enter number then click onfirm appointment.

App	Book Appointment					×
у То	Cinic Cardiology	& Practitione		entify Patient	- 🖋 Confirm	
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) N	Visit type Video Consultation	Appointment details Practitioner	Darren Test	Send appointment text message to		
deo	Consultation time 0130 pm	Clinic	Cardiology Wednesday April 22 2020			
C Ir	Potient Mrs csc-donotuse / xxtestpatientco	Appointment time Potient Details	01:30 pm - 01:45 pm	+44 7816905471		
Y	() Confirm	Patient Name	Mrs csc-donotuse xxtestpatientco			
V					\frown	
					onfirm Appointment	

Step 8

On confirmation the appointment is added into the clinicians calender...

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				1pm •	Mrs csc-denotuse xxtestporphice H#10000007		
				2.000			
				x pro		There are no pending documentations for today.	
				3 pm			
				4 pm			

Step 9

... and a text message with joining details is automatically sent to the patient (including clinician name) A video consultation has been booked for with clinician name on 31/03/2020 13:00-14:00. To join you don't need to install anything. Just click on this -> <u>Start</u> <u>consultation link</u>

10 minutes before your appointment time from a mobile phone, tablet or laptop chrome browser.



Linking patients to Engage How to link a patient record to their app

Step 1

When a patient registers for the Engage application, they enter their mobile number. If this matches a number in the portal they are automatically linked.

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Step 2

If their mobile number was not found you need to manually link them. To do this just find their record in portal and select activate form the Engage tab.

Step 3

Now just search for their mobile phone number. Confirm it's the right patient returned then click connect. Done. Simple.







Complete 'Quick link' meeting How to log in to meet your clinician

Step 1

Open up link on mobile phone browser or copy link to your computer browser (with web cam). Please join 5 mins before the start.



Step 2

You can now test and turn on your video and audio. Then just click join, accept the terms and conditions and your session will begin!



Step 3

You can now complete your consultation with your clinician. If for any reason you lose connection just refresh your browser.





Book appointment

How patients make their own booking

Step 1 Step 2 NHS Select 'consult a Login to the **COVID - 1**9 **Engage patient** care provider' application and then select 5.2 'consult online' Step 3 Step 4 Continence Care Select the Select your speciality that clinician your clinician is in Step 5 Step 6 Receive Select the time confirmation of from the booking and text 8:00 pm Thu 2 Apr available slots Online Consultation Appointment Reference 268 reminder with details



Complete your meeting via app How to log in to meet your clinician

NHS Step 1 Step 2 Either select the Login to the **COVID - 1**9 alerts bell, or **Engage patient** calendar application 5.2 Step 3A Or Step 3B CC_MS Hayley Elizabeth TESTER @ From alerts From calendar Steve Duffield Start meeting by Start meeting More N clicking on the by clicking on CC_MS Hayley Elizabeth TESTER E Darren Test video screen 'join now' NO TASKS

Step 5

You are now in the virtual waiting room. Your clinician knows you are waiting and will be

with you shortly.

While waiting you can fill in the **questionnaire** or

upload any images you want to discuss.





Complete mobile consultation

How clinicians complete consultation on mobile

Step 1 Login to the Collaborate application and enter 4 digit pin



From home screen select appointments



Step 3

You can now see all your appointment info, and any patients waiting to be seen



Step 4 See today's appointments and select start when ready



Step 5 The consultation will now start. You can view the patient record during the call



Step 6 Finally complete your consultation notes using predefined templates





Complete laptop consultation

How clinicians complete consultation on laptop

Step 1 Login to Clinical Portal using your phone number and password (Tip : if you forget it just request an OTP)



Step 2

Select your appointments and you will be taken to your calendar for today. You can see your diary and anyone waiting.

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1	My Appointments			Today F	Future Show calendar Stove Dutt		
8	My Tasks			Today 05 Apr	2020	Patients in waiting room	
	Soon			02 pm			
	Waiting	١	0				
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	In waiting room	٥	0	03 pm	Ma Mandau Flandadh TFCTFD United		
	Yet to start	3	0		· ws huyby blockburn tearbe mission		
	Visit Type Video Consultation	2					Pending documentation ()
				04 pm			
							There are no pending documentations for today.
					Mr PAUL DICKINSON H000202		

Step 3

You can use the toggle to look at your future calendar



Next step, next page



Complete laptop consultation

How clinicians complete consultation on laptop

Step 4 Selecting the patient provides you with additional detail about the patient and appointment



Step 5

When a patient comes into the waiting room you'll get an alert. Just click 'start' when you're ready.

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My Tasks		Today 05 Ap	2020 👔 In person 👪 Video consultation	Patients in waiting room (1)	
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Waiting	0	0			
Yet to come	0	0			
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In waiting room	0	0			
Yot to stort	(2)	0	to pre	Ms Hoyley Elizabeth TESTER HIS2001	
Visit Type					
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Patient CC_M5 Ho Waiting For Video	yłcy Eis Consul	rabeth	TESTER IS	MP PAUL DICKINSON HI00002	There are no pending documentations for toda

Step 6

You are now in your video consultation and can meet your patient. You can still view their record, or start a consultation note

Next step, next page



Complete laptop consultation

How clinicians complete consultation on laptop

Step 7

A predefined consultation note will be available for you to populate during the call (if you choose)

all duration 57 s	\odot	Consultation note	
rs csc-donotus 10000007	e xxtestpatientco	Video Consultation	Video Consultation Notes
pointment	22 Apr 2020 13:28	- 110100	
I dotails	22 Apr 2020 13:28 - 22 Apr 2020 13:28 (67 s)	Proviow	

Step 8

When you are ready to finish the call you just press the red icon to hang up. Then review and submit your consultation note.

	. 🥝	Consultation note		×	
Mrs csc-donotus HFT000007	se xotestpatientco	Video Consultation	Video Consultation Notes		
Appointment	22 Apr 2020 13:28		Joe Bloggs is progressing well		
Coll details	22 Apr 2020 13:28 - 22 Apr 2020 13:28 (57 s)	Proviow	Populate consultation note text here.		
				_	
		Filter mandatory fields only			

Step 9

When you submit the note the note is stored in the record. You can access the patient record, view and copy the consultation note.



Common questions

Can I use my own phone?	The Collaborate application works on all Android phones (version x or above)
Can I use my own laptop?	The Clinical Portal will work from any Chrome browser.
What network connection do I need?	To access the Clinical Portal you need to be connected to the HSCN (N3) network. The Collaborate application can work over internet.
What support is there from clinical systems?	

Please get in touch with support on XX for any other queries



Can I use my own phone?

Yes any IoS or Android smart phone will work

Please get in touch with support on XX for any other queries